



## CHAPTER OFFICERS 2006-2007

### President

**Noel Diaz, RHIA, HIS Director**  
Sansum Clinic  
(805) 681-7527  
President@ccarma.org

### Vice President

**Suzanne Scar**  
Central Coast Imaging Solutions  
(805) 566-1900  
VicePresident@ccarma.org

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Verizon  
(805) 372-6489

### Membership Director

**Starla Lago**  
City of Santa Barbara  
(805) 564-5309  
Membership@ccarma.org

### Programs Director

**Northern Chapter Area**  
**VACANT**

**Central Chapter Area**  
**Cyndi Rodriguez, CMC**  
City of Santa Barbara  
(805) 564-5309  
Programs@ccarma.org

**Southern Chapter Area**  
**VACANT**

### At-large Directors

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**Tom Zuur**  
CalPoly State University  
(805) 756-6016  
DirectorNorth@ccarma.org

**Southern Chapter Area**  
**Chuck Barkee**  
Tab of Central California  
(805) 383-4100  
DirectorSouth@ccarma.org

### We Need You!!

If you are interested in serving in any of the vacant positions, please contact one of the board members!! ~ Thanks!!  
*(The time commitment is small; approx 1-2 hrs a month)*

## Effective Communication

Part 1 of a Short Series of Articles

by Helen M. Streck, Chapter Member

As a professional in the field of Records and Information Management (RIM), I am amazed that many times we do not become engaged until the middle of the records lifecycle. The continual battle of managing the records that are created and used by staff everyday is a case in point why we must be involved at the beginning of the records lifecycle.

This article will be the first article in a series to address creating good written communication such as memos, e-mail, and other recorded correspondence. RIM professionals should be educating staff members on developing good written communication; the issues surrounding the management of communications; the impact volume has if there are not management controls; and finally the consequences of poor communication in regard to litigation.

Communication by virtue of its definition implies a two-part activity – delivering a message and receiving a message. The approach to delivering an effective communication begins with determining the correct vehicle for the message. Messages that should never have been written have a long lasting effect found in the newspaper or publicized on television. Humans react too quickly by responding to a message and hitting the send button before we think through the consequences that our words can have. If we were more aware of the consequence or impact of our words, we may not write what we do today. Our words can cause an emotional response and, without seeing someone, we do not have the impact of their reaction to temper our words.

With e-mail being the primary modality for sending the written business communication, it is tempting to “fire off” a response before considering all the facts or the ramifications when we have had someone push our emotional button. Business communication has taken on a whole new flavor.

Before temptation forces you to respond in a manner that requires you to do more work in following up with explanations, or far worse, with an apology, ask yourself these four questions:

1. Do I have all the facts regarding this issue or situation?
2. What am I requesting of the reader with my message?
3. Am I informing, giving direction or educating?
4. What is the best way to deliver my message?

The few seconds it takes to answer these four questions before you begin writing your communication helps you to deliver a more professional correspondence.

*The second part of this series will cover the key steps the writer should take in composing the memo or e-mail.*

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### Impressions

Cheryl A. Young's Planning an Imaging Conversion for Shared Electronic Documents

by Noel Diaz, RHIA, Chapter President

In the March-April 2007 issue of Chapter Chatter, I enthusiastically shared my thoughts on the hot topics of electronic records and e-mail documents following Diane R. Gladwell's enlightening talk at our January general meeting held in Thousand Oaks. While it was firstly about fully grasping her elucidations on the latest compliance issues pertinent to electronic communications and then secondly attempting to explore with her their applicability in one's specialized area of record management, it still was incumbent upon me as a health information administrator to transfer the knowledge gained into my own universe and identify the impact to my daily duties and responsibilities in the workplace.

In San Luis Obispo last March 23<sup>rd</sup>, we discovered yet another way of understanding the many facets and challenges of electronic document management. This time, in the Council Hearing Room of the San Luis Obispo City Hall, two dozen or so record and information managers in attendance were "converted" by the presenter, Cheryl A. Young, CDIA, into well informed, well guided systems project managers by way of her seminar entitled Planning an Imaging Conversion for Shared Electronic Records.

(Continued on page 4)

### 2007 Pacific Region Leadership Training



**"Don't Count on Lady Luck to Pull You Through"**

July 13-14 - Las Vegas, NV  
Alexis Park Hotel

Hosted by the Las Vegas Chapter

Join your Pacific Region Leaders for a terrific new program, "Leadership: Developing the Leader's Skill Set." This program will be an active, engaging combination of presentations and discussions, facilitated by *Dr. Charles R. Stoner, McCord Professor, Bradley University*. This half-day workshop will address some of the behavioral skills that are important for contemporary leaders. Special attention will be given to the skills that differentiate successful from less than successful leaders. A jam-packed two days of programs are designed to expand your leadership and management skills as well as your RIM competencies. Why should you meet your peers in *Las Vegas this July*? Because "leading" either within your organization or within ARMA requires expanding your knowledge and skills.

This year's programs will be lead by some of the very best leaders within ARMA.

We are very pleased this year to have *Carol Choksy, Ph.D., CRM, PMP, ARMA international President-Elect*, and *Trevor Mitchel, ARMA's Manager of Member Services*.

Don't miss this excellent opportunity. Achieve leadership success and build management skills along with other RIM professionals who are active in ARMA chapters from Arizona, California, Hawaii, Nevada and Utah.

### Reservations

The Alexis Park Resort – Las Vegas, Nevada, has been selected for this year's conference.



For hotel reservations, please contact the Alexis Park Resort directly at 1-800-582-2228 no later than JUNE 12, 2007. Please make sure to ask for the ARMA Group Block to receive our special room rates. The hotel room rates are:

\$109.00 per night for the Monarch Suites (Queen, Double-Double, King); \$159.00 per night for the Crown Suite (Loft); \$209.00 per night for the Majestic Suite (Super king); and \$259.00 per night for the Regal Suite (2-Bedroom), plus room tax of 9%.

For more information about the hotel and the facility, log on to their website at [www.alexispark.com](http://www.alexispark.com)

Please make all hotel reservations through the 800 number only!

### Conference Cost

\$175.00 for one to three persons; \$150.00 for four or more persons from the same ARMA chapter.

Registration includes 2 breakfasts, 2 lunches, morning and afternoon breaks, and all educational sessions and handouts.

*CCARMA Members, please contact Noel Diaz, President. Registration scholarships are also available for incoming CCARMA Chapter Board Members!*



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Upcoming Meeting News -

Effective Communication

Writing good e-mail messages and the impacts of poor e-mail creation on an organization.



Friday, May 25, 2007  
Speaker: Helen M. Streck

Records and Information Management (RIM) professionals are good at managing information. Managing, at the mid-point of the lifecycle of a record that is already created is where we get most of our training and where we spend most of our time on the job. Have you

ever wondered what effect you could make if you educated your staff or your organization on how to "create" good documents?

This educational session will focus on creating, delivering and receiving "Effective Communication." Courts and opposing counsel are now going after e-mail in an organization. The impact that discovery has on highlighting poor e-mail creation will be discussed

Mrs. Streck is the Associate Director of Corporate Records and Information Management for Amgen, Inc. in Thousand Oaks, California, and has been an ARMA member for 20 years. She is affiliated with the Central Coastal Chapter and the Pacific Region.

**WHEN:** Friday, May 25, 2007 • 11:30 a.m. – 1:30 p.m.

**WHERE:** Chase Palm Park - Casa las Palmas  
23 E. Cabrillo Blvd. (mountain side) Santa Barbara, CA

**COST:** \$12 for CCARMA Members and  
\$15 for Non-Members and Guests  
Includes an Italian Lunch of Pasta, Salad and Garlic rolls from Palazzio Restaurant

**RSVP:** Send registration form by Noon on Friday, May 18, 2007 \*\*

\*\* Reservations & payments or cancellations must be received before noon on Friday, May 18 2007 - You will be billed if you do not cancel by this date.

The First 25 people to register by May 15th will be entered into a raffle to win one of two gift baskets!!  
(You must be present at the meeting to win)

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[www.CCIS.bz](http://www.CCIS.bz)

*Spring & Summer Birthday's*

May 3 - Cyndi Rodriguez  
May 13 - Marilyn Allison  
June 16 - Kelly Wetmore  
July 1 - Tom Zuur  
August 14 - Antoinette Mann  
August 21- Patricia Perez  
August 24 - Laura Johnson

*We want to celebrate you, so make sure we have your birthday information. E-mail it to: [Newsletter@ccarma.org](mailto:Newsletter@ccarma.org)*

**Membership Spotlight -**

In our effort to get to know our membership better, starting in September, the CCARMA Chapter Chatter will "Spotlight a member every edition.

We will be calling on you to provide a very short profile (examples will be on the website this summer) and provide a photo (optional).

**ARMA Pacific Region  
Announcements**

We are pleased to announce that Bruce Bailey will be joining the Pacific Region team as Region Coordinator. He will begin his duties beginning July 1, 2007, joining Theresa Joenks and Brian Moriki. Each will receive his or her Chapter assignments at the annual Region Board Meeting held just before the Leadership Conference.

Bruce is replacing Fred Walden. Fred has completed his two-year term and we offer him many thanks and much appreciation for all the great work he has done for the region.

Do you have some information to share to the rest of the Central Coast Chapter of ARMA? Are you interested in writing an article for the Chapter Chatter? If so, please E-mail: [Newsletter@ccarma.org](mailto:Newsletter@ccarma.org)

(Continued from page 2)

In proving once again that there is always something new and useful to learn in the world of RIM, sometimes in spite of our natural resistance to daunting tasks and complex challenges, Cheryl effectively demonstrated that there is no reason to believe any one of us could not be as successful as she had been—and still is—when charged with implementing new procedures along with new technology. Cheryl drew wisely and effectively from her 23 years of experience and provided some very straightforward yet powerful advice.

Describing herself as a records and information systems architect, Cheryl provided at the outset the usual overviews and current definitions relevant to documents and record management, not unlike Diane R. Gladwell's introductory clarifications on such terms as metadata and data integrity. She also indulged the audience with her own drill-down version of the language of record management, covering such essential concepts as retention schedules, records destruction, and taxonomic indexing (in connection with reducing the number of missing/inaccessible electronic files), all of which she emphasized as critical to the success of managing shared electronic documents.

Besides solid tips on how to be a change manager, how to build solution foundation by getting the right people on board, and how to work effectively with the IT folks and design policies and procedures that actually work, Cheryl discussed ways of improving one's preparation for potential

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lawsuits, indicating the importance of linking users to every record they individually access. She elaborated on the gravity of avoiding regulatory audits and outside scrutiny, along with avoiding loss of organizational reputation and market valuation. And she spelled out the rationale for reducing the number of lost claims, lawsuits, court-imposed sanctions, and large penalties.

There were many detailed and invaluable guidelines incorporated in this seminar, which extended to almost two hours when including the Q&A session. For example, one of the most essential pieces of information I personally took home was the discussion on the Model Requirements for the Management of Electronic Records ("MoReq"). In brief, these requirements or standards that need to be imposed on any electronic record management system (ERMS) being implemented are the following: (A) ERMS must allow system administrators to add electronic volumes to any electronic folder which is not closed (e.g. 2006, 2007, etc.); (B) ERMS must record the date of opening of new volume in the volume's metadata; (C) whenever a new volume is opened, ERMS must automatically include in its metadata those attributes of its parent folder's metadata which are common (e.g. name, classification code, etc.); and (D) if volumes are utilized within ERMS, the security and access requirements that apply to folders must be applied to volumes as well.

To sum up her message, Cheryl Young indicated that it behooves one to define the end result first. In other words, what does a paperless office mean to your company—exactly? Consider how transparent the system could and should be, affording the end user as much ease as possible when going through filing and retrieval procedures in a paperless environment. (Cheryl described this as the desirable, if not mandatory, two-clicks-and-you-are-there optimum process.) Other key considerations include making sure that your metadata is complete and secure, and moving forward positively first with a model department or office when initiating a global change. And, of course, be thoroughly familiar with new Federal guidelines, such as the applicable provisions and amendments contained in the Federal Rules of Civil Procedure (FRCP). Compliance, after all, is the biggest key. Just ask Diane.

## *Workplace Identity Theft* Prevention Manual \$99.95

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### Advertising Opportunities

We are excited to announce that advertisements will now be accepted for the Chapter Chatter!

#### Advertisement Specifications

The Chapter Chatter is published six (6) times a year (January/February, March/April, May/June, July/August, September/October, November/December) and is sent out during the first week of January, March, May, July, September and November.

Advertising artwork and fees (checks made payable to CCARMA) are due by the 10<sup>th</sup> of the month prior to the issue date of the next newsletter.

#### Artwork Specifications & Rates

Electronic format is preferred

- JPEG, GIF, PDF, TIFF, WMF or EPS
- At least 300 dpi
- 100% size

Advertising Space Sizes:

*BUSINESS CARD* - Standard size 3.5" x 2" (vertical or horizontal) Cost \$125\* (1-3 issues<sup>††</sup>)

*QUARTER PAGE* - approximately 3.5" x 4.5 (vertical) Cost \$225\* (1-3 issues<sup>††</sup>)

*SPECIAL FLYER/INSERT* - 4.25" x 5" Cost \$125\* (per issue)

*\*Fees will be reduced if advertiser joins Chapter.  
†† \$25.00 discount offered if publishes in all six (6) issues.*

*~ Rates are subject to change ~*

E-mail [Newsletter@ccarma.org](mailto:Newsletter@ccarma.org) for additional information.



Do you have a couple of hours a month to spare?? We need you!! If you are interested in Chapter Leadership, please email [Info@ccarma.org](mailto:Info@ccarma.org)



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### ARMA Washington Policy Briefs

<http://www.arma.org/news/policybrief/index.cfm?Type=W>

#### E-Bill of Rights Legislation Introduced in WA

Washington state Rep. Jeff Morris introduced HB 1031, which intends to establish individual privacy rights so that manufacturers and sellers of new, innovative technologies have a predictable set of known, individual rights to be aware of before offering their technology for sale or use in the state of Washington. More...

<http://www.arma.org/news/policybrief/index.cfm?BriefID=1759>

#### New FCC Rules Aim to Protect Phone Records

The Federal Communications Commission (FCC) issued rules designed to strengthen existing privacy safeguards by requiring telephone and wireless carriers to adopt additional safeguards to protect the personal telephone records of consumers from unauthorized disclosure. More...

<http://www.arma.org/news/policybrief/index.cfm?BriefID=1755>

### What is ARMA International?

The leading professional association in the growing field of records and information management. ARMA International provides a wide range of benefits to help its members grow in their chosen profession. Members are offered technical publications, a certification program, and a variety of continuing education opportunities, including local meetings and seminars on records management topics, plus a comprehensive annual conference. ARMA International has over 10,000 members in countries around the world. Founded in 1955, ARMA International has more than 140 local chapters, providing networking opportunities as well as local, regional, and international events. [www.arma.org](http://www.arma.org)

### The Chapter Chatter

Chapter Chatter is a publication of the Central Coast Chapter of ARMA International.

This newsletter is published to inform members and interested parties of the activities of the Chapter and to disseminate news and information.

We welcome all articles, letters, comments and contributions from interested individuals.

The information contained in this newsletter does not necessarily reflect the official policy or opinion of ARMA, the Central Coast Chapter of ARMA or its members, nor is there any endorsement of ads, seminars, articles or commentaries intended; it is offered as a source of information only.

Newsletter & Website Administrator:

Starla Lago

(805) 564-5309

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## Central Coast Chapter of ARMA International

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*Presents:*

### Effective Communication

Writing good e-mail messages and the impacts of poor e-mail creation on an organization.

*Speaker, **Helen M. Streck***

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